HIV Management System (HMS) Loader (HMSLoader) Entry User Manual
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REVISION AND HISTORY PAGE

Document Version #	Software Release #	Revision Date	Description of Change	Section # / Paragraph #	Modifier
		7/16/04	Introduced Revision/History Page to Established Doc	NA	S. Camacho
		8/11/2006	Update to Transfers section	Section 4.7	M. Figueroa

HMS (HIV MANAGEMENT SYSTEM) LOADER ENTRY
APPLICATION V.1.1
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EXHIBITS

Welcome to HMSLoader

SECTION 1 - HMSLoader INTRODUCTION

1.1 Identification

The HIV Management System (HMS) Loader (HMSLoader) is a web browser-based application for the submission of blood test demographic information through manual and electronic entry. HMSLoader is designed to support the Department of the Navy, Marine Corps, and Department of Defense beneficiary user community by providing access through the Internet using the Microsoft Internet Explorer (IE) browser. The Navy Central HIV Program (NCHP) manages this application as a secure web-based replacement for the Automated Request Form (ARF) subsystem of the Automated Link Service (ALS). By using IE, NCHP can deliver this service to a broader number of Department of Defense (DoD) users.

1.2 HMSLoader Entry and User Guide Overview

The HMSLoader Entry User Manuals apply to the features associated with the HMSLoader web application. The major function provided by the HMSLoader Entry site is to allow registered POC's to enter or upload demographic information to submit specimens to the blood-testing contractor. Entry submissions are sent electronically to Navy Central HIV Program HMSLoader Administrators at the National Naval Medical Center in Bethesda Maryland.

The HMSLoader site has three main modules for Loader entry requests – Actions, Personal and Transfers.

Actions – Allows tests to be entered verified or shipped.
Personal – Allows user to set defaults and change password.
Transfers – Allows users to upload test orders.

1.3 Site Access Criteria

HMSLoader Entry is accessed by way of the Internet using Microsoft Internet Explorer (IE) web 5.5 or above. Your computer should, in most cases, already have a current version of IE Explorer installed. If, however, you need to install or re-install IE Explorer, you may access the free download files from the following site:
http://www.microsoft.com/windows/ie/downloads/default.asp

1.4 Necessary System Requirements

The following requirements are itemized below for SAMS transfers. These requirements are necessary before usage can begin.
SAMS users– Versions 8.02 and 8.03 (Unencrypted) and 8.03.02

1.5 Assistance

If you need assistance you may contact:
>   Navy Central HIV Program
>   National Naval Medical Center
>   Bethesda, Maryland 20889-5600
>   Com: 301-295-6590/DSN: 295-6590
>   Fax: 301-295-1639
>   E-mail: nchp@bethesda.med.navy.mil

SECTION 2 – GETTING STARTED

2.1 Launching Internet Explorer
Open the Microsoft Internet Explorer browser from either the Programs toolbar shown below or the Internet Explorer icon, typically found on the desktop.

Exhibit 2.0 — Windows Menu
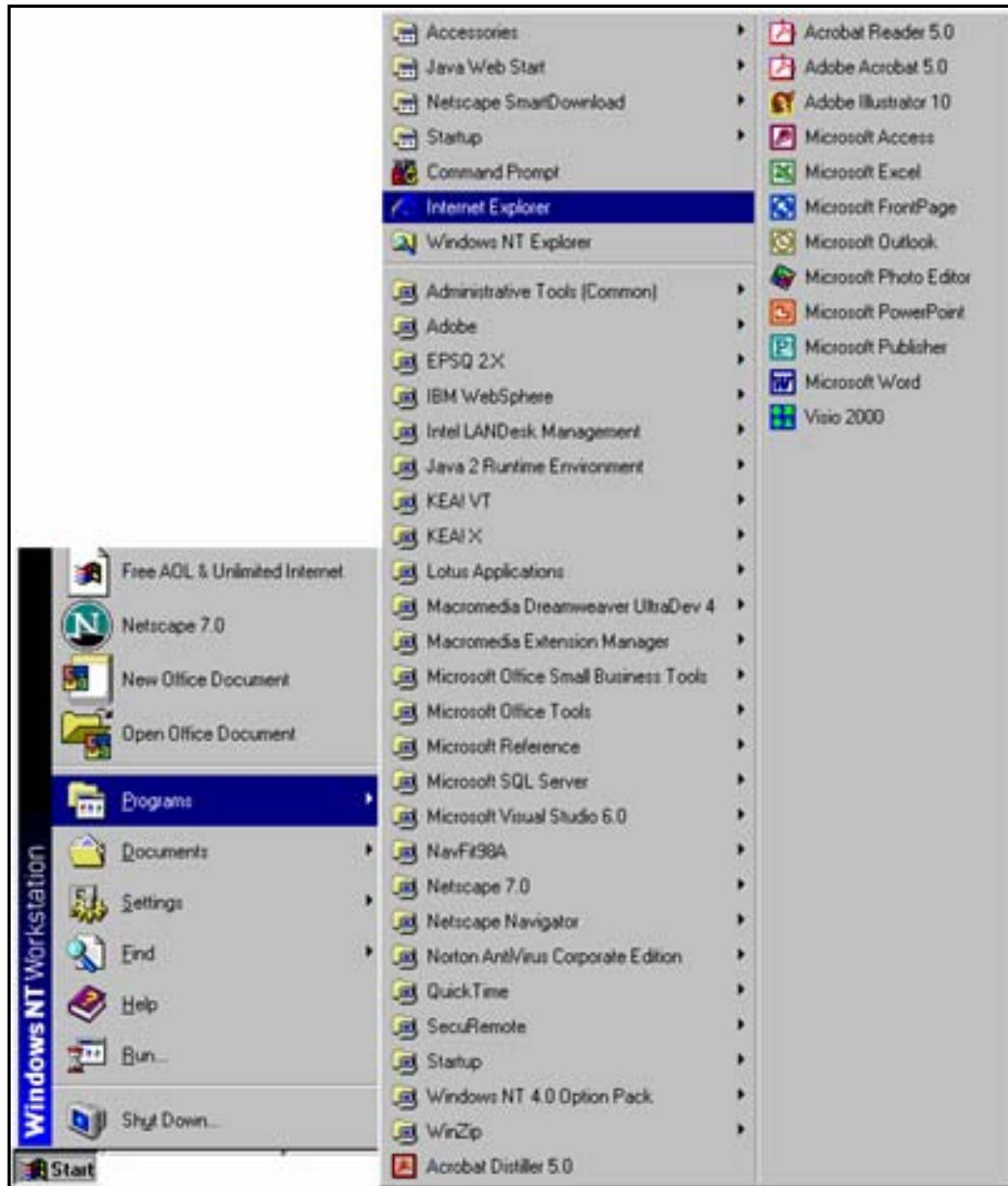
Step 1

Click Start
 -Programs
   -Internet Explorer.

2.2 Internet Explorer – Trusted and Local Site Configuration

Once IE has been launched, there are a few configuration rules that must be designated in the settings prior to HMSLoader access. **These procedures must be done for EACH USER's Login - the browser settings are specific to EACH LOGIN!!**
Follow the steps below to configure IE.
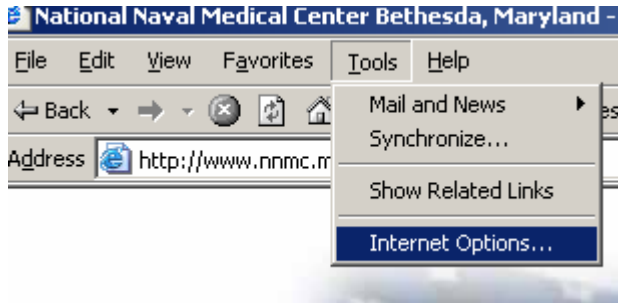
Step 1. Open Internet Explorer.

Step 2. Select "Tools" from the menu

Step 3. Select Internet Options.

Exhibit 2.1 - Internet Explorer Browser

2.2.1 Trusted Sites

This setting allows HMSLoader screens to display properly by preventing ActiveX prompts from appearing when new screens are loaded in Internet Explorer.
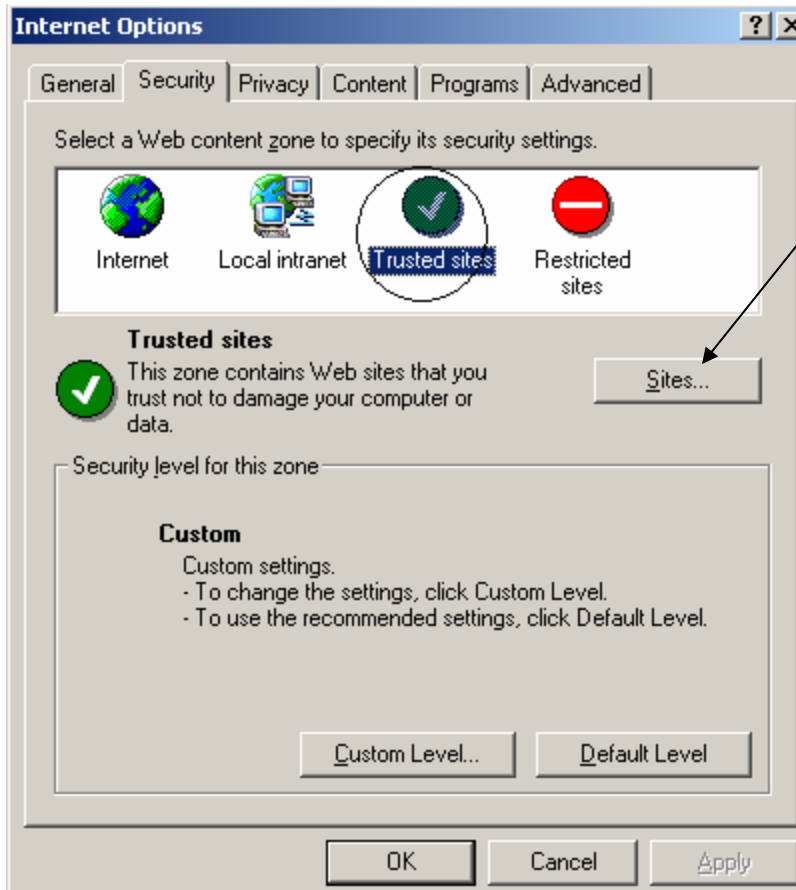
Step 1. Click on the Security tab.

Step 2. Click on the Trusted sites icon.

Step 3. Click the Sites button.

Exhibit 2.2 –Internet Options/Security/Trusted Sites

Step 4. Type or paste* the full HMSLoader address next to the "Add" button as shown in Exhibit 2.3 HMSLoader address is
https://xhmseaccess.bethesda.med.navy.mil/HMSLEntry

Step 5. Click the "Add" button. The HMSLoader address should now appear in the "Web Sites" window.

(**Timesaver Note:** *you can copy and paste the website address into your browser rather than type it!*)
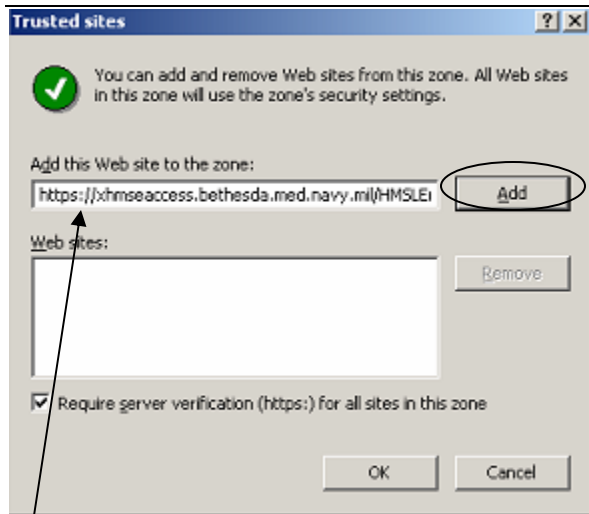
Exhibit 2.3- Trusted Sites

When the HMSLoader address has been added correctly, the Trusted Sites screen should display as shown in Exhibit 2.3b.
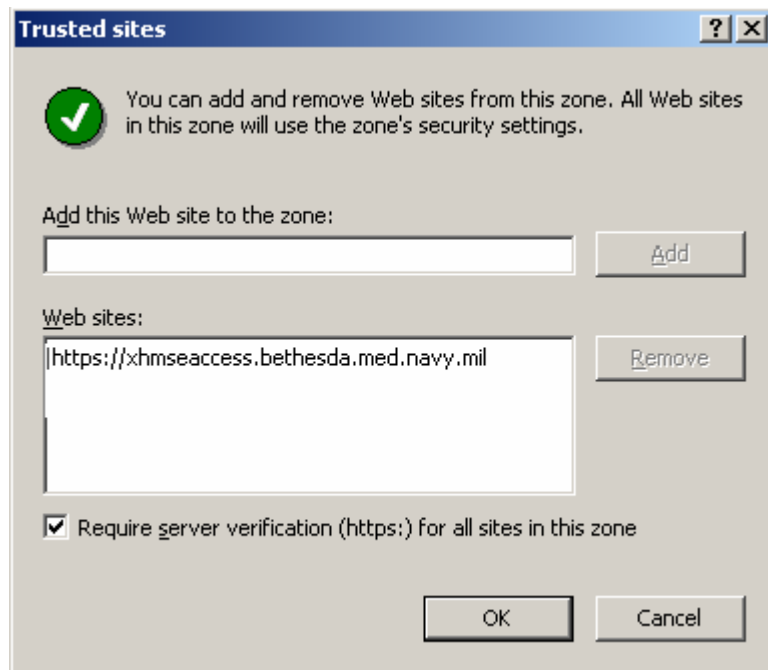
Step 6. Click "OK".

Exhibit 2.3b - Trusted Sites

2.2.2 Internet Settings Configuration
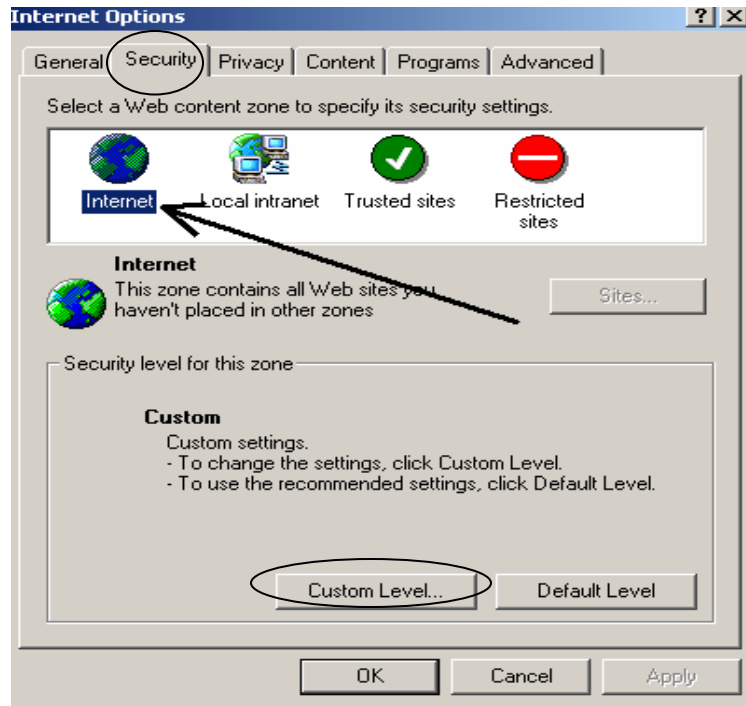
Step 1. Click on the Internet icon. (The "Security" tab remains selected.)

Step 2. Click on the "Custom Level" button.

The Security Settings window will display.

Exhibit 2.4 –Internet Settings
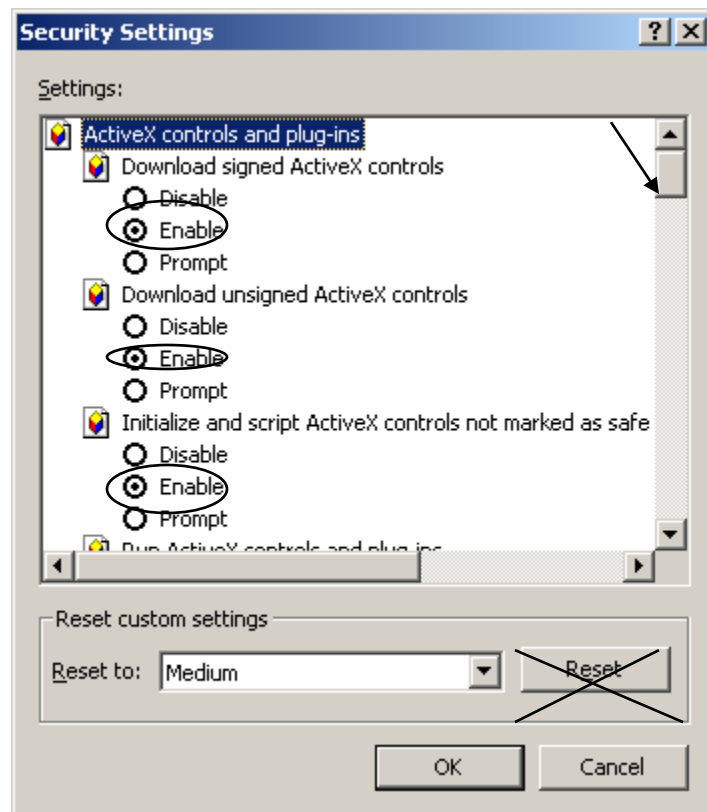
Step 3. In the Security Settings window, click the "Enable" button for each category as follows:
- Download signed ActiveX controls
- Download unsigned ActiveX controls
- Initialize and script ActiveX controls not marked as safe.
- Run ActiveX controls and plug-ins
- Script Active X controls marked safe for scripting.

You MUST use your scroll bar to access all the ActiveX options!!

HMSLoader will not work properly if these settings are incorrect!

Note: *Do not press the "Reset" button. Pressing the "Reset" button will return everything to its previous state.*

Exhibit 2.4a –Internet Security Settings

Security Settings

Settings:

- Run ActiveX controls and plug-ins
  - ○ Administrator approved
  - ○ Disable
  - ⦿ Enable
  - ○ Prompt
- Script ActiveX controls marked safe for scripting
  - ○ Disable
  - ⦿ Enable
  - ○ Prompt
- Downloads
  - File download
    - ○ Disable
    - ⦿ Enable
  - Font download
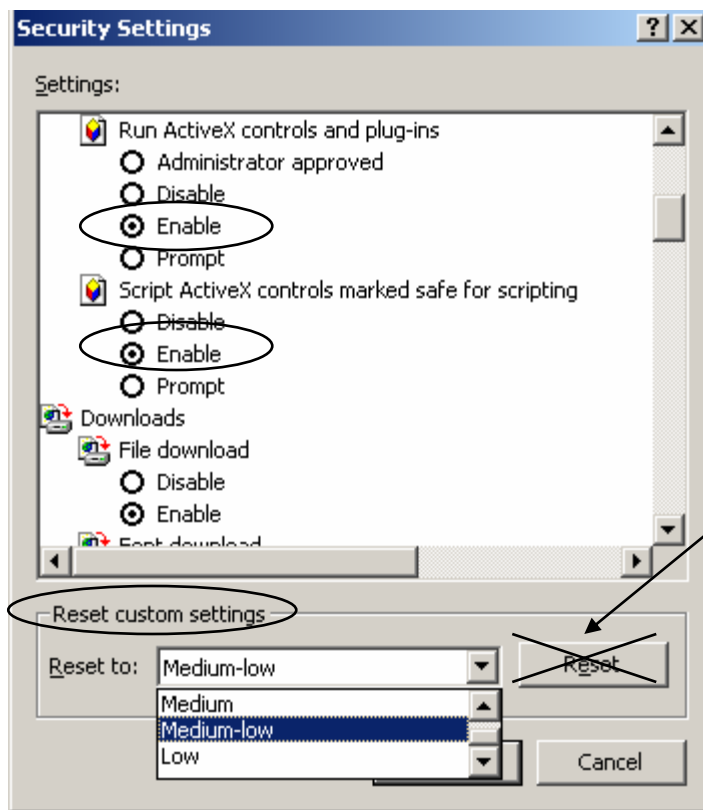
Reminder:
Don't click the "Reset" button!!!

Reset custom settings

Reset to: Medium-low

Medium
Medium-low
Low

Reset

Cancel

Step 4 Reset custom settings:
Reset to: Medium-low.
Click to highlight "Medium-low" from the drop-down menu

Exhibit 2.4b –Internet Security Settings

Reminder: *Do not press the "Reset" button. Pressing the "Reset" button will return everything to its previous state.*

Reset custom settings

Reset to: Medium-low

Reset

OK   Cancel
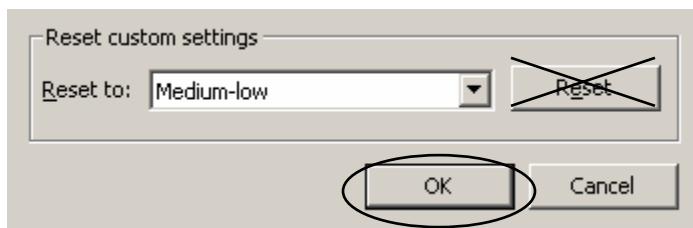
Step 5 "Medium-low" setting displays. Click "OK".

Exhibit 2.4c –Internet Security Settings

Warning!

⚠ Are you sure you want to change the security settings for this zone?

Yes   No
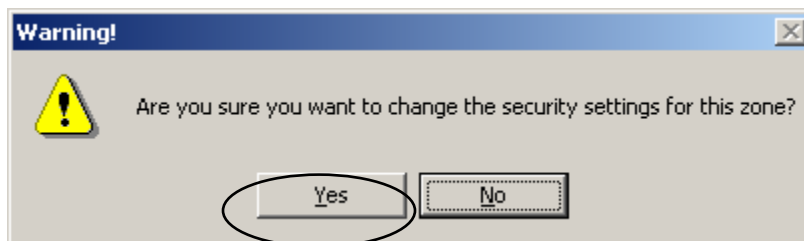
Step 6. Warning appears as in Exhibit 2.4d.
Click "Yes" to accept the settings.
Screen will display as in

Exhibit 2.4d –Internet Security Settings

Final Step. To allow the new settings to take effect, you must now CLOSE THE BROWSER (Internet Explorer). You may then re-open Internet Explorer to log into HMS Loader.

SECTION 3 – HMSLoader ENTRY SITE ACCESS

3.1 Secure Web Address via the Internet
To access the HMSLoader Entry site, the secure Loader URL (site address) must be entered in the "Address" box of the Internet Explorer window. Press "Enter" or click "GO" to navigate to the site.
Internet address (URL): https://xhmseaccess.bethesda.med.navy.mil/HMSLEntry
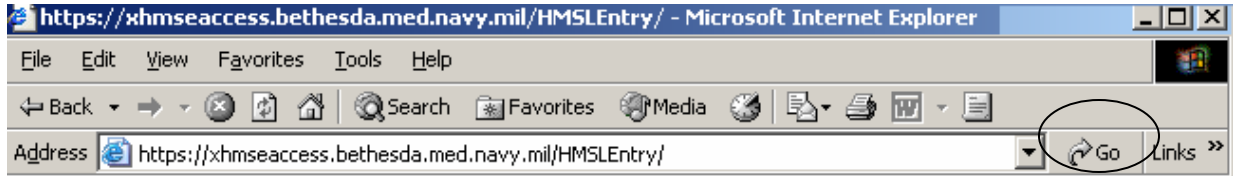
Exhibit 3.1 - HMSLoader Web Address

Note: *This address is "case sensitive" and must be entered* **exactly** *as shown.*

3.2 Windows Security Alert – Secure Web Access
A Windows Security Alert will appear once the HMSLoader URL is entered in the address path of Internet Explorer. Click "Yes" to proceed to the HMSLoader main page.
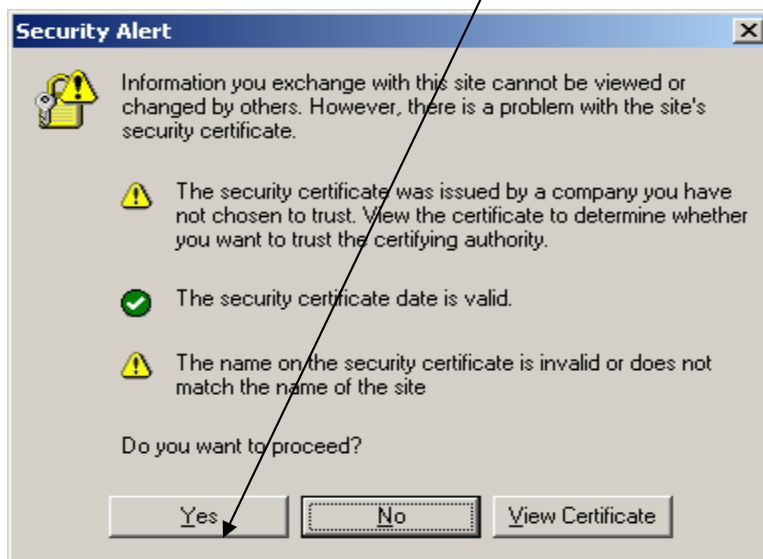
Exhibit 3.2 – Windows Security Alert

SECTION 4 – HMSLOADER ENTRY MODULE

4.1 DoD & Privacy Act Agreement
Upon site access, the screen below will appear displaying the Department of Defense System and Privacy Act Notices. After reading the information, the user can either click the "Accept" button to access the HMSLoader Entry Main screen or the "Decline*" button to exit. (*Note: If you decline, the HMSLoader web site the system will redirect the web browser to the Navy's homepage [*www.navy.mil*]).

Click **"Accept"** to enter HMSLoader

Exhibit 4.1 –"Accept" button (DoD & Privacy Act screen)

4.2 Initial Logon for New Point of Contact (POC)
All new POCs will receive a User ID via email from NCHP upon registration approval. The Authorization Lookup (printed after POC registration is finished) is the first time password. This registration information will be used for the initial Logon. Upon the first successful login, HMSLoader prompts that the password has expired and needs changing.

Navy Central HIV Service

NCHS Support
Freedom of Information Act

Your password is expired. Please change.

Your password has expired. You must choose a new password.

Old password:
New Password:
Confirm

Save   Cancel
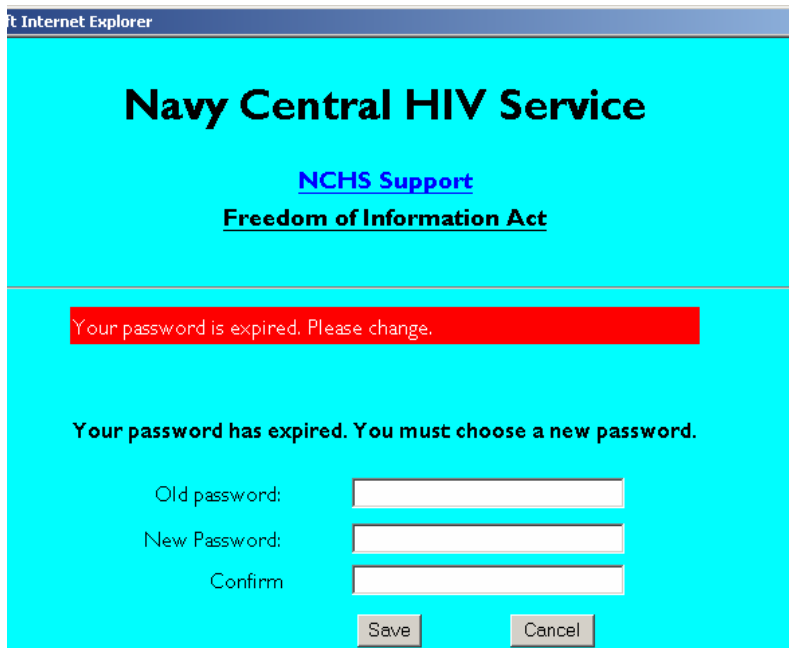
Exhibit 4.2 – Initial Logon for New POC

To change the password:

1. Enter the *current password* (the **Authorization Lookup** from registration).
If you do not have this password, please contact NCHP via email.

2. Enter the *new password* of your choice. You must then confirm this new password by retyping it in the *Confirm Password* text entry box.

For Password Requirements reference Page 18 (section 4.6.2)

3. Click the **Save** button (once the desired information has been added)

4.3 HMSLoader Main Entry Screen
The Entry Module has four options:

- Logout
- Actions
- Personal
- Transfers
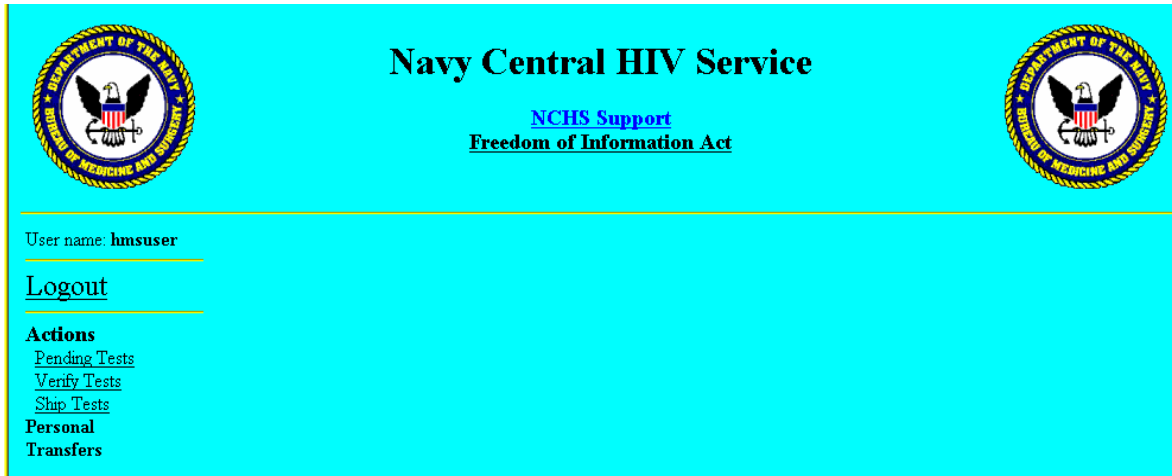
Exhibit 4.3 –HMSLoader Main Entry Screen

4.4 HMSLoader Logout
Click on the Logout hypertext link to exit the HMSLoader application and then close the additional window that remains open.
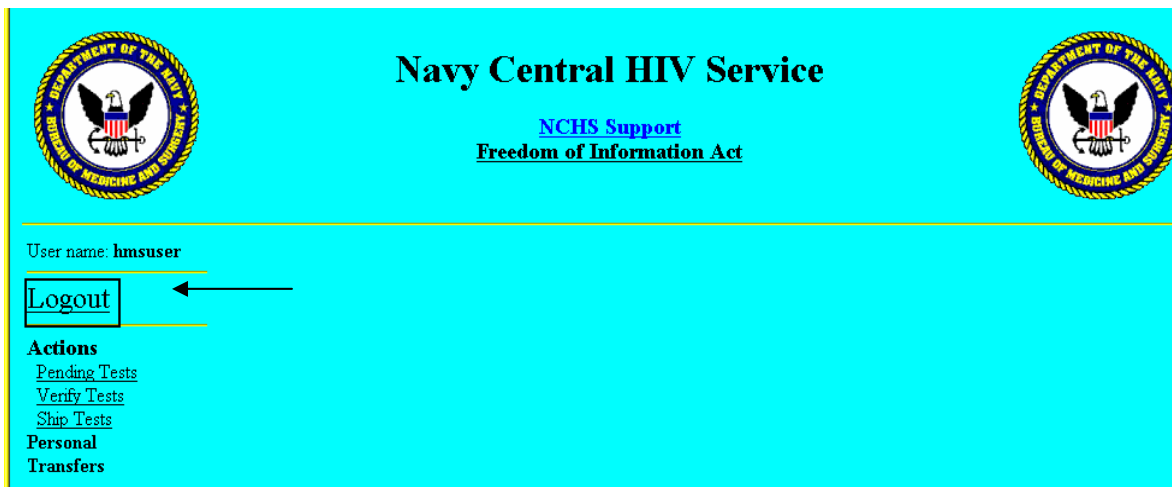
Exhibit 4.4 – HMSLoader Logout

Note:
Close both
windows
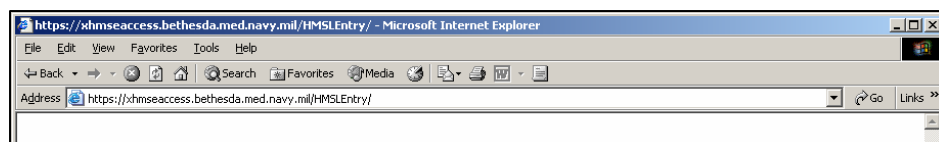
4.5 HMSLoader Actions Menu

Logout

Actions
  Pending Tests
  Verify Tests
  Ship Tests
Personal
Transfers

Registration
Admin Actions
Maintenance
Reports
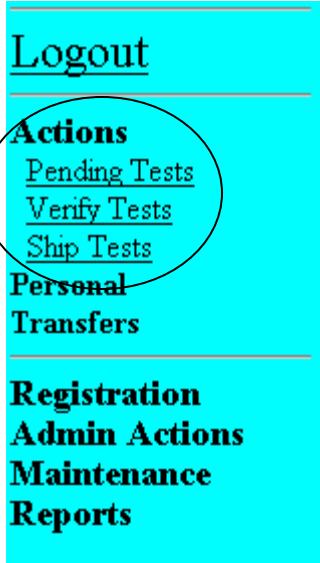
The HMSLoader menu contains an "Actions" function that allows 1) for the entry of blood test demographic information, 2) validation of demographic information to identify common data entry errors, and 3) finally, the electronic upload of the demographic information to an NCHP-designated laboratory contractor for further processing.

The following POC actions are available as part of the Actions menu:

Pending Tests, Verify Tests, and Ship Tests.

Exhibit 4.5 – Actions Menu Options
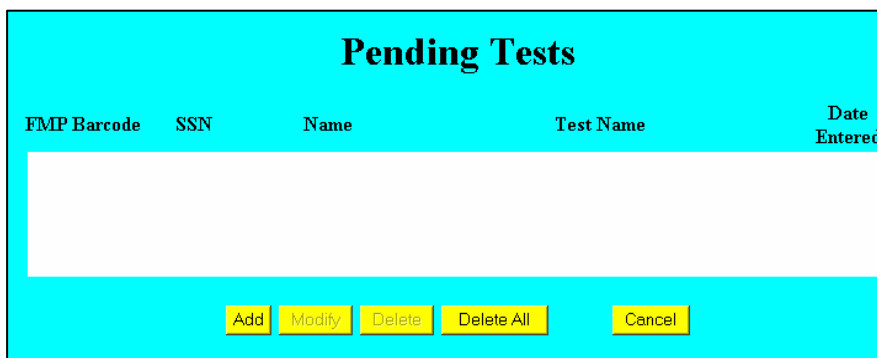
4.5.1 Pending Tests

This action allows the POC to enter, modify, or delete demographic information about collected blood specimens to be processed by the laboratory. Collectively, this information is called the Pending Tests list.

Data elements will include such items as FMP, Social Security Number (SSN), Name, Barcode, as well as other information required to accurately track the test.

4.5.1.1 Add Tests and Member Data

To access the Pending Tests screen, click the **Pending Tests** hypertext link under the **Actions** menu. The Pending Tests screen is displayed.

Pending Tests

FMP Barcode	SSN	Name	Test Name	Date Entered

Add | Modify | Delete | Delete All | Cancel

Exhibit 4-6. Pending Tests Screen

To add member data into the system, click the **Add** button.

Exhibit 4-7. Add Member Screen

Enter the required information fields for the "Add Member Screen." The following table outlines the requirements of each field:

Field Name	Required	Notes
FMP	Yes	Set to default. Change as required.
SSN	Yes	Enter w/ no dashes. Displayed as "*********" on screen.
SSN	Yes	Re-enter previous SSN.
Last Name	Yes	
First Name	Yes	
Middle Initial	No	
Suffix	No	
Barcode	Yes	Increments after first entry. Change as required.
Tests	Yes	Type of Test. Set to default. Change as required
SOT	Yes	Source of Test. Choose a letter indicating the type of test to be performed. Default setting may be changed.

Field Name	Required	Notes
RTC/BDN	No	Recruit Training Command Number/ Blood Donor Number (required field)
Duty Code	Yes	Set to default. Change as required.
DOB	Yes	Date of Birth of member. MUST BE IN REQUIRED FORMAT!
Date Drawn	Yes	Defaults to current system date. Change as required.
Date test ordered	Yes	Defaults to current system date. Change as required.
Comments	No	

Exhibit 4-8. Data Entry Field Descriptions

Press the **Add** button if there is only one entry to be made into the system. If there are multiple entries to be made, press the **Add & New button**, which will save the entry and clear the screen to add another. As tests are added, the barcode will automatically count the next consecutive number. If a new number sequence is needed, just enter the new number and HMSLoader will continue to increment from the new number. The default for the Date drawn will be the current date.

Once all the necessary entries are made, return to the Pending Tests screen to verify the information was saved and ready for verification.

Pending Tests

FMP	Barcode	SSN	Name	Test Name	Date Entered
20	N30N000097	001012544	nowtest, laura, r	HIV-1 Initial ELISA	3/5/2003

1 test requires validation.

Add   Modify   Delete   Delete All   Cancel

Exhibit 4-9. Pending Tests with Member Information

4.5.1.2 Modify (Pending Tests)

To modify a record before verifying it, go to Pending Tests action. The Pending Tests page is displayed (Exhibit 4-9). Select the record to be modified, the record selected will appear gray. The Modify button is activated. Click on the **Modify** button.

The screen to modify Pending Tests is displayed (Exhibit 4-10). Any of the fields shown can be modified.

Once finished, click **Modify** to save the changes made.

The Pending Tests page is displayed again.

Exhibit 4-10. Modify Pending Test Screen

4.5.1.3 Delete

To delete a record, select the Pending Tests action. Click on the record to be deleted. The **Delete** and **Delete All** buttons are activated. Select one or all of the tests to be deleted then click the **Delete** button (or **Delete All** button if you have selected multiple tests). If you click on the Cancel button, you will be returned to the Pending Tests page. The Pending Tests page is displayed again. The deleted tests will not be removed if you click "Cancel."

Exhibit 4-11. Pending Tests Screen-ready to Delete!

Exhibit 4-12. Delete (Individual) Tests Page

4.5.2 Verification Process

After entering the blood specimen demographic data, the "verify" action must be performed. The verify action performs a preliminary review of the demographic information entered in an attempt to reduce the most common data entry errors. Checks will be performed on the FMP, SSN, Name, and Date of Birth. This information will be compared to the corresponding information stored at NCHP. The POC will be notified of any discrepancies on screen and will be allowed to either accept the information from NCHP, or override that information with the data entered.

To verify the tests entered, click the **Verify Tests** hypertext link under the Actions Menu. The test verification page will be displayed-giving the options to accept, skip, or delete the record. Only records with discrepancies will be shown for verification.

Exhibit 4-13. Verify Tests Hyperlink

Exhibit 4-14. Verify Tests Page

If the test information is acceptable, click the **Accept Specimen** button. Pressing the **Skip** button skips over the current test record and brings up the next test for verification. Skipped tests must be either verified later or deleted before shipping.

Use the Delete button to delete records you do not want to ship.

Pressing the **Cancel** button returns to verification page. However, it does not cancel the previously verified tests.

Once all tests have been verified, a message screen will appear stating that the Verification Process has been completed. The POC can proceed to the Ship Tests portion of the process.

NOTE: In order to proceed to the test shipment process, all tests shown for verification must be validated. If samples are not validated, a prompt will appear.

4.5.3 Ship Tests

This action transfers information from the Pending Tests list. Once completed, "Ship Tests" will remove the information from the POCs Pending Tests list, thus allowing subsequent processing of a new batch of demographic information. In order to execute this action, all information in the Pending Tests list must be verified.

To access the Test Shipment page, click the **Ship Tests** hypertext link under the Actions
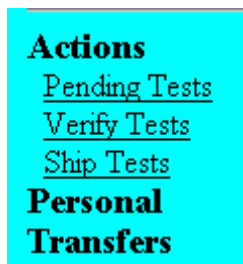
NOTE: First & last barcodes must be entered, even if a break in sequence occurs by changing to a new roll of barcode labels.

Exhibit 4-15. "Ship Tests" Hyperlink and "Ship Tests"

Select courier information from the drop down menu.

Enter the airbill or tracking number. Enter the first barcode number shipped. Enter number of tests shipped. Enter last barcode shipped. The ship date defaults to the current date.

Exhibit 4-16. Ship Tests Confirmation Page

Once all ship test information has been entered, a Shipment Confirmation message screen will appear stating that the Current tests have been marked as shipped.

4.6 Personal Menu Options

This selection allows the users to change the default options for test entry and to change their HMSLoader passwords.
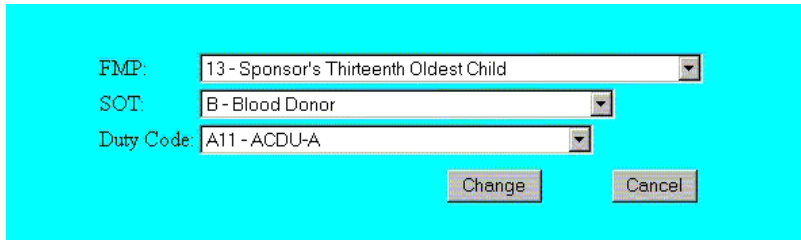
Exhibit 4-17. Personal Menu Options

4.6.1 Set Defaults

During the entry of test information, the user is required to enter a value for Family Member Prefix (FMP), Source of Test (SOT), and Duty Code. Typically, this information is often repeated for each test entered. The Set Defaults function allows the POC to select default values for these three data items. These values will then be used during the test data entry.

To edit the test entry defaults click the **Personal** hypertext link. Next, click the Set Defaults hypertext link. The Set Defaults Page is displayed.

Use the drop-down boxes to choose the preferred system defaults and click the **Change** button to save changes. If you click on **Cancel,** you will be returned to HMSLoader Main screen (Exhibit 2-4) and any changes will not be saved.
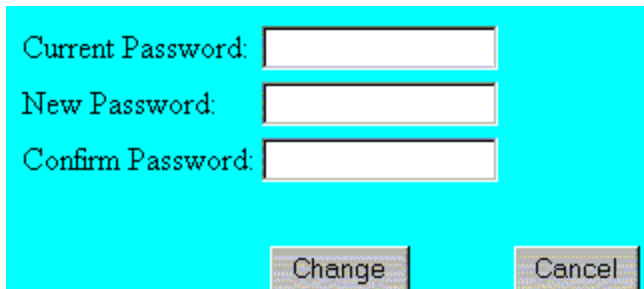
Exhibit 4-18. Set Defaults (Options)

4.6.2 Changing Password

POCs are responsible for maintaining their password. This function allows the POC to change their password at any time or, at a minimum, the POC will be required to change it every ninety (90) days. Passwords must be a minimum length of eight (8) characters and a maximum of thirty (30) characters. They must have at least one uppercase letter, one lowercase letter, and two numbers.

To change the password, click the **Change Password** hypertext link under the **Personal** Menu. The Change Password page is displayed in Exhibit 4-19.

Exhibit 4-19. Change Password Page

The current password and new password must be typed in the text boxes as shown above. The new password must be confirmed by retyping it in the *Confirm Password* text entry box.

Once the desired information has been added, click the **Change** button to save. (Click on the Cancel button to exit the screen without changing the password.)

4.7 Transfers

HMSLoader allows for uploads of Shipboard Non-Tactical ADP Program (SNAP) Automated Medical System (SAMS) data. Click the **Transfer** hypertext link to display the Upload options shown in Exhibit 4-20.

Logout

**Actions
Personal
Transfers**
  SAMS Upload
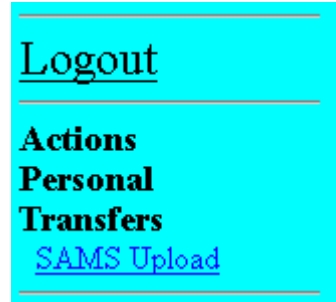
> ***Note***: *Internet settings configuration on page 6 must be completed for the Browse button to work for any of the file transfers.*

Exhibit 4-20 Transfers Upload Options

4.7.1 SAMS Upload

HMSLoader allows uploads of SAMS Versions 8.02, 8.03 (Unencrypted) and 8.03.02.[1] The SAMS Upload function allows a POC to upload SAMS demographic information previously stored on their local computer or floppy disk. To access the SAMS Upload screen, click on the **SAMS Upload** hypertext link under the Transfers Menu. The SAMS Data Upload screen is displayed.
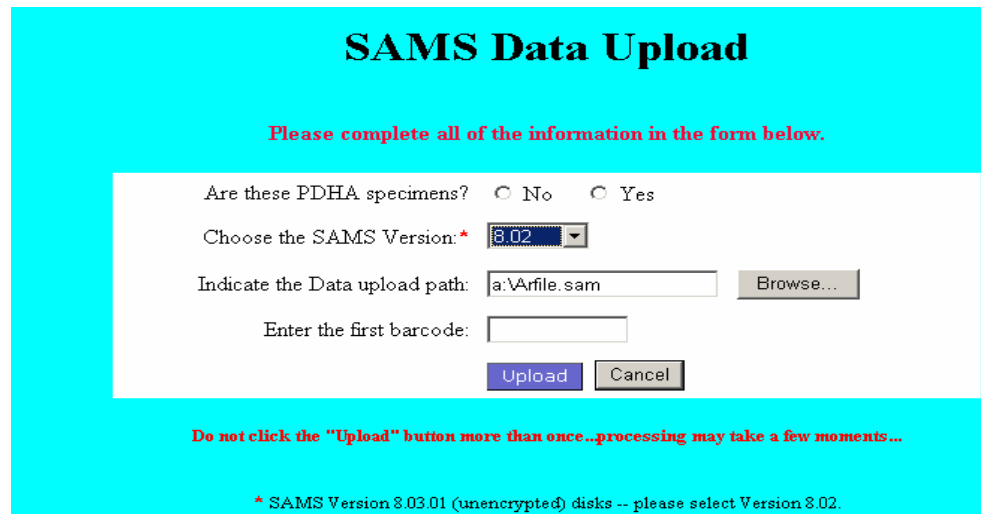
SAMS Data Upload

Please complete all of the information in the form below.

Are these PDHA specimens? ○ No   ○ Yes
Choose the SAMS Version: * [8.02 ▼]
Indicate the Data upload path: [a:\Arfile.sam] [Browse...]
Enter the first barcode: [   ]

[Upload] [Cancel]

Do not click the "Upload" button more than once...processing may take a few moments...

* SAMS Version 8.03.01 (unencrypted) disks -- please select Version 8.02.

Exhibit 4-21. SAMS Data Upload Screen

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[1] SAMS is a Government off-the-shelf product and is used by Fleet; Fleet Marine Force; Marine Corps Reserve Force; Bureau of Medicine and Surgery; and other authorized users.

Follow the steps below to upload SAMS version 8.02 and 8.03.01 data to the designated Navy Contractor Laboratory. *Please reference Exhibit 4-21.*

    1) Select the PDHA option.
    2) Click on **Browse...** button
            The path to the A: drive will be prompted. Change path if necessary.

    3) Select the appropriate SAMS file.
    *(In order to process SAMS data, a file entitled arfile.sam must first be present on the PC. The SAMS files are usually received on a disk to be placed in the **A: drive** on the local PC.)*

    4) Enter (type) the first barcode.

    5) Click the **Upload File** button to proceed or the **Cancel** button to cancel.
    PLEASE BE PATIENT AND DO NOT CLICK THE **UPLOAD** BUTTON MORE THAN ONCE!

When the files are successfully uploaded, the message "Successfully Imported SAMS records" will display.

Exhibit 4-22. SAMS 8.03.02 Data Upload Screen

Follow the steps below to upload SAMS version 8.03.02 data to the designated Navy Contractor Laboratory. *Please reference Exhibit 4-22.*

    1) Select the PDHA option.
    2) Click on **Browse...** button
            The path to the A: drive will be prompted. Change path if necessary.

    3) Select SAMS version 8.03.02.
    4) Click the **Upload File** button to proceed or the **Cancel** button to cancel.

ANNEX A: ABBREVIATIONS, ACRONYMS, AND TERMS

This section identifies abbreviations, acronyms, and terms that will aid in the understanding of this document.

ALS	Automated Linked Service
ARF	Automated Request Form
BUMED	Bureau of Medicine and Surgery
DoD	Department of Defense
DoDD	Department of Defense Directive
DON	Department Of the Navy
HIV	Human Immunodeficiency Virus
HMS	HIV Management System
IE	Internet Explorer
MHS	Military Treatment Health System
MTF	Military Treatment Facility
NCHP	Navy Central HIV Program
NNMC	National Naval Medical Center
OASD (HA)	Office of the Assistant Secretary of Defense (Health Affairs)
POC	Point Of Contact
SAMS	Shipboard Non-Tactical ADP Program (SNAP) Automated Medical System

A.1 HMSLoader Manual Entry Process

A flowchart titled "HMSLoader Manual Processing" with the following steps:

Left column:
- HMSLoader Manual Processing
- Verify Member's data with photo ID
- Perform Draw and label SSTs
- Centrifuge all specimens — *note: Specimens **must** be centrifuged within six (6) hours of collection.*
- Order SSTs to match roster
- Login to the HMSLoader web site.
- Select **Actions**
- Select **Pending Specimens**
- Click on the **Add** button
- Enter the first barcode number — *note: Pre-printed barcodes are sequentially numbered. HMSLoader automatically assigns the numbers to the uploaded roster.*

Right column:
- Enter Member's demographic data
- Attach barcode to SST. — *note: Barcode must be placed on the tube in a vertical position.*
- Click on Add or Add New (Add New loops back to Enter Member's demographic data) — *note: Add is used to store the member information and return to the Pending Specimens screen. Add new stores the data and opens a new data entry form with the next sequential barcode already entered.*
- Select **Verify Specimens** (Add) — *note: User has option to accept master file data presented, correct the entered data, or accept the data as is.*
- Select **Ship Specimens**
- Enter shipping information
- Click on Ship button
- Logout of HMSLoader
- Ship SSTs to Laboratory
- End of process

A.2 HMSLoader SAMS Data Process

The flowchart "HMSLoader SAMS Data Process" contains the following elements:

Left column:
- SAMS Processing (start)
- Start the SAMS program
- Generate HIV Roster — *Select the option to have the roster sorted by Last Name not by SSN.*
- Print SAMS Labels
- Perform Draw and label SSTs — *Maintain specimens in Last Name order.*
- Edit roster to reflect actual draw
- Print Roster in Last Name order
- Label SSTs w/ pre-printed barcodes — *If a barcode label is damaged, move SST to the end. Continue labeling the rest of the SSTs in order. Label missed SSTs at the end of the process.*
- Use roster to create SAMS data file — *Create file on a diskette if moving information to another computer. Store file on hard drive if using the same computer to access HMSLoader.*
- Login to the HMSLoader web site.
- Select Transfers

Right column:
- A (connector)
- Select SAMS Upload
- Enter the path to the SAMS file — *Browse button may be used to locate the file a:file.sam.*
- Enter the first barcode number — *Pre-printed barcodes are sequentially numbered. HMSLoader automatically assigns the numbers to the uploaded roster.*
- Click on Upload File
- File accepted? — No → Correct SAMS errors and resubmit → Go to → A
- Yes
- Logout of HMSLoader
- Ship SSTs to Laboratory
- End of process